

Technical and Administrative Support For the Small Business Outreach Center

Statement of Work

Background:

The Office of Small and Disadvantaged Business Utilization (OSDBU) has responsibility within the Agency for policy, procedures and oversight of the implementation of programs described under Section 8 and 15 of the Small Business Act as Amended and Executive Orders 12073, 12432 and 12138 relating to preference programs for small, small disadvantaged, women-owned businesses, HUBZone and service disabled veteran concerns. We also serve as an advocate, counselor, trainer and liaison to the small business community. The services are administered through participation in outreach activities, including interagency sponsored conferences, one-on-one counseling and group training seminars.

A major part of this effort includes providing outreach to the small business and socioeconomic communities. As such, the OSDBU has opened a Small Business Outreach Center designed to meet this need. In this Center, OSDBU provides counseling and technical assistance to its constituents.

Objective:

The intent of this requirement shall be to support the implementation of programs described under Section 8 and 15 of the Small Business Act as Amended and Executive Orders 12073, 12432 and 12138, relating to preference programs for small, small disadvantaged, women-owned, HUBZone and service disabled veteran concerns.

Scope of Work:

The contractor shall supply services that will broaden the capabilities of the EPA Small Business Outreach Center in the areas of counseling, technical assistance, training, and outreach support services to companies that have some business related experience. Counseling services for those individuals/concerns interested in starting a “brand new” business should be referred to a Small Business Development Center (SBDC), the Small Business Administration (SBA), SBA Procurement Center Representative (PCR) or a Procurement Technical Assistance Center (PTAC).

Tasks:

Task 1: Counseling Services

The counseling services provided shall be specific to the various EPA programs and shall

be designed to familiarize small, minority and women-owned business owners; HUBZones; service disabled veterans; Historically Black Colleges and Universities (HBCUs); and other minority institutions, including Tribal Colleges and Universities and Hispanic Serving Institutions, with potential procurement and grant opportunities offered by various EPA program offices. These services shall be customized to prepare businesses for submitting contract proposals and grant applications based on specific EPA requirements. Examples of this type of assistance are:

- Advising Firms On How to Do Business with EPA
- Drafting Corporate Capability Statements
- Preparing Financial Statements
- Providing Assistance in Completing EPA Request for Proposal (RFP) Forms
- Providing Assistance in Completing Grant Applications and related forms

The services shall vary according to the requirements of the EPA Program or opportunity that is being promoted to the small, minority and women-owned business community, HUBZone, service disabled veterans, HBCUs, and other minority institutions. Counseling services shall include one-on-one counseling sessions as well as group sessions for “Doing Business With EPA”.

Should the need arise for any specialized services beyond the capability of the contractor, the contractor shall meet with the Project Officer first. The contractor shall then identify other sources, such as utilizing the EPA SBA Procurement Contract Representative, the Howard University Small Business Development Center or a Procurement Technical Assistance Center.

Acceptance Criteria:

Counseling services will be deemed acceptable if they meet the needs of the clients. The adequacy of counseling services will be evaluated by the Project Officer (PO) through reviews of recurring reports submitted by the contractor, reviews of evaluation forms submitted by clients, and observations of training and counseling sessions. The Counseling Program Evaluation Form requires a client/training participant to complete a questionnaire after attending a counseling session. At the conclusion of the counseling session, the client is required to complete the form and leave it with OSDBU. The forms are collected and the results are compiled on a quarterly basis by the Project Officer. The ratings are categorized as Strongly Agree, Agree and Strongly Disagree. At a minimum, the ratings required to be considered acceptable should fall within the Agree category. The contractor is responsible for rescheduling meetings and/or training sessions that the contractor has to cancel. Within two business days, the contractor shall provide the client timely notice for rescheduling. More than two meeting cancellations without proper rescheduling in a calendar quarter are deemed unacceptable. In addition, more than two instances in a calendar quarter of no contractor personnel being on site without documentation of a bonafide emergency, shall be deemed unacceptable. In the case of an emergency, the contractor shall immediately notify the PO or Alternate Project Officer (APO) at (202) 564-4100 or call the OSDBU office at the same number if the PO or APO is not available.

Deliverable:

The contractor shall provide one-on-one counseling sessions as requested by clients, as well as six group training and counseling sessions each year. The contractor shall provide the EPA PO a Quarterly Report showing the number of one-on-one counseling sessions and group training and counseling sessions held each quarter. This report shall also indicate any contacts made with EPA Program offices/personnel. The contractor shall provide a report indicating follow-up meetings with clients that reflect the number of meetings held with a client along with success stories particularly those clients that were awarded grants and or contracts with EPA.

Task 2: General Management Training and Technical Assistance

The process of counseling businesses concerning specific procurement and/or grant opportunities at EPA requires general management and technical assistance. Many firms will need to address basic management issues before submitting contract proposals and/or grant applications to EPA. These services may include but not limited to:

- How To Start a Small Business
- Development of Business Plans
- Financing
- Procurement
- Legal Planning
- Development and Submission of Loan Packages
- Management and Organization Techniques
- Accounting and Bookkeeping Assistance
- Marketing and Product Development Assistance
- Small Business Loans and Financial Assistance
- Utilizing Information Technology for Business Purposes
- Environmentally Sound Business Practices
- Financial Assistance Agreements vs Contracts
- How to Complete a Grant Application
- How to Manage a Federal Grant
- Environmentally Sound Business Practices
- How to Obtain an 8(a) Certification
- Assistance with registering in the Central Contractor Registration (CCR) Database

Technical Assistance shall be provided on a one-on-one basis, or in group training sessions. All Counselor/Instructors shall have the requisite experience and/or training.

Acceptance Criteria:

The technical assistance provided shall meet the needs of the clients. The adequacy of the assistance provided will be evaluated by the Project Officer through reviews of recurring reports submitted by the contractor, reviews of evaluation forms submitted by clients, and observations of counseling and/or training sessions.

Deliverable:

The contractor shall provide one-on-one technical assistance as requested by clients and six group training sessions per year. The contractor shall provide the PO with an annual training schedule showing the planned group training sessions each year. Concurrently, the contractor shall provide instruction in the various areas required by this task. The contractor shall provide each participant a copy of the approved training manual. The contractor shall submit any addendums to the manual to the PO for approval 30 days before the addendum will be distributed to clients.

Task 3: Outreach services

The Contractor shall promote the EPA Small Business Outreach Center services to the general small business/and socioeconomic communities with particular concentration in the Washington, DC and Metropolitan Area; and to some degree, EPA's 10 Regional Offices. The purpose of the outreach services shall include, but are not limited to:

- Providing Support to EPA OSDBU by conducting OSDBU Counseling and Outreach Sessions
- Participating in business fairs, seminars and appropriate conferences
- Accompanying OSDBU to Meetings with Small Business Associations, Chambers of Commerce, EPA Program and Contracting Staff, Contractors, and Grant Recipients

Acceptance Criteria:

Input provided by the contractor shall be acceptable if deemed by the PO to have been meaningful, supportive, and to have provided added value. The results of the Outreach Services will be based on the overall evaluations received from the clients/participants having received a one-on-one counseling session and attendance at group training sessions.

Deliverable:

Quarterly Reports provided by the contractor shall include the number of OSDBU Outreach Sessions supported, business fairs attended, and meetings with Small Business Associations, Chambers of Commerce, EPA personnel, contractors, and grant recipients.

Task 4: Business Counseling Data Collection and Tracking

The Contractor shall implement operating procedures to track the success of the business counseling program that include but are not limited to the following steps:

- **In-take Process.** To identify how the needs of each client will be documented.
- **Tracking/Follow-up Process.** To keep track of each client's successful business dealings with EPA.
- **Review Process.** To meet the PO and/or OSDBU Director quarterly, or on an as needed basis, to discuss the progress of the contract or any other issues that may arise.

Acceptance Criteria:

Operating procedures shall be evaluated by the PO to determine whether they adequately track the various steps of the counseling process. At a minimum, the contractor must maintain an in-take process, track and follow-up with each client met with through the outreach center and meet with the EPA OSDBU as needed to discuss issues or contractual concerns.

Deliverable:

The contractor shall provide draft operating procedures for review and approval by the PO each year. In addition, the contractor shall summarize the intake and tracking process in the Quarterly Reports to the PO and meet with the PO and/or the OSDBU Director quarterly or as required to discuss major issues. Two quarterly meets must be held during an annual contract period to discuss processes and other contractual concerns.

Task 5: Preparation of Recurring Monthly Reports

The contractor shall provide the project officer with the following recurring monthly reports:

- a. A monthly report showing the names, signatures, arrival times, and departure times of each contractor employee working each day. The Outreach Development Center is expected to be open and available during the core hours of operation (9:00 a.m. through 5:00 p.m.). EPA must be notified by the contractor by close of business on the day before if another representative will be Acting for the Managing Director in his/her absence or when the Center will be closed.
- b. A monthly report showing the names, addresses, and phone number of clients counseled, the dates they were counseled and the services provided to them.
- c. A monthly calendar showing all **planned** group counseling sessions and other group

outreach sessions.

- d. A monthly report showing all **actual** group counseling sessions including the purpose, agenda, a copy of the attendee list, and the outcome of the counseling sessions with details and results.

Acceptance Criteria:

The format for these reports shall be designed by the contractor and approved by the Project Officer (PO). Once the forms are approved by the PO, each required monthly reports shall be submitted in a timely manner containing all of the required details and results/outcome of the counseling sessions.

Deliverable:

The contractor shall submit a format for the monthly recurring reports to the PO for approval within five working days after award of the contract or option. The contractor will then submit recurring reports in the approved format within five working days after the end of each month to the PO.

Task 6: Customer Feedback

The contractor shall design and the Project Officer (PO) approve a one-page form to obtain feedback from individuals counseled. The contractor shall provide the form to each client attending either a one-on-one or group session, and the client shall return the form to OSDBU.

Acceptance Criteria

The feedback form shall be deemed appropriate when approved by the PO. The feedback form shall contain evaluation criteria pertinent to the importance of the counseling sessions and training sessions along with items related to the counselor, training instructor, the course content and materials and the overall counseling and training session.

Deliverable:

The draft feedback form shall be presented to the PO for approval. In addition, recurring monthly reports will be submitted to the PO for review no later than five working days after the end of each month.

General Requirements

The contractor may suggest no or low cost training classes and certificate programs offered by other sources that can meet general and/or specific business requirements. OSDBU will not be responsible for any costs associated with these training classes/programs. This contract does not allow for costs to be charged for training sessions held by the contractor.

The contractor shall assign a full time (total hours worked on project in a week must be 40 hours per week), experienced Managing Director/Counselor to the outreach center, a part time counselor (total hours worked on project in a week must be less 40 hours per week but no less than 24 hours per week), and a student/technical assistant (total hours worked on project must be approximately 20 hours per week). A specific event/seminar/conference may require the Center to be open and available during after hours and/or during the weekend. The Managing Director/Counselor shall possess knowledge of all aspects of establishing, managing, and expanding a business enterprise. The Managing Director/Counselor shall have an in-depth knowledge of outreach techniques and small business advocacy topics. The Managing Director/Counselor shall be thoroughly familiar with the structure of EPA and its programs, and procurement and grant opportunities for small business and under-utilized minority entities. This includes:

- Understanding of the organizational Mission, Goals and Legislative requirements of EPA.
- Identifying EPA programs EPA that generate major procurement and/or grant opportunities.
- Identifying and establishing rapport with EPA personnel directly responsible for procurement and grant opportunities.
- Studying and staying current concerning EPA and related Federal government agency legislation that impacts small businesses.
- The contractor shall provide EPA with highlights and success stories for the OSDBU Quarterly Newsletter and the same information will be posted on the OSDBU web page.

Submission of Invoices

Pursuant to FAR 52.213-2, the contractor shall submit their invoices on a monthly basis but no less than quarterly.

Period of Performance

The period of performance for the base period will be one (1) year from the effective date of award with three (3) option period of one (1) year each for a total potential period of performance not exceeding four (4) years.

Location of the Outreach Center

The center will be located in a space provided by EPA's Office of Small and Disadvantaged Business Utilization (OSDBU) as part of its Small Business Outreach efforts. The Center will be located within the OSDBU but separated from the daily operations and activities of

OSDBU in Washington, D.C. One-on-one counseling sessions are to be held in the center's assigned conference room or the OSDBU Outreach Center or in other locations, but only if these alternate locations are approved by the Project Officer (PO) on a case by case basis.

Hours of Operation

General core hours of operation: 9:00 a.m. to 5:00 p.m., Monday through Friday. The Center will be closed on Federal Holidays and weekends. Federal holidays are:

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|---------------------------------|---------------------|
| 1) New Year's Day | 6) Labor Day |
| 2) Martin Luther King Day | 7) Columbus Day |
| 3) George Washington's Birthday | 8) Veterans Day |
| 4) Memorial Day | 9) Thanksgiving Day |
| 5) Independence Day | 10) Christmas Day |

The Outreach Center may be required to remain open for extended hours of operation. The Managing Director must be available for evenings and weekend training, seminars, conferences, etc. as necessary and approved by the PO. These extended hours of operation may occur for no more than twice per quarter for approximately four (4) additional hours for evening or weekend special sessions.

In accordance with the Contract Management Manual, Section 20.10 covers the EPA's "Policy for Reimbursement of Contractor Costs for Agency Closures for other than Appropriation Hiatuses". When the Agency or any part thereof is closed as a result of factors such as weather conditions, natural disasters, Executive Orders, building hazards, or public safety, Contracting Officers will not need to stop work on contracts, but will need to advise contractors regarding payment of labor charges. Section 20.10(a) states that: Generally, for contract performance at Government facilities, the Agency will not reimburse contractors for labor costs as a direct charge during the closure if the contractor does not perform. If contract services can and are performed at a different location, contractors may be reimbursed for direct labor as a direct charge. Contractors should be instructed that they will not normally be reimbursed as a direct charge for labor costs for on-site employees who were unable to perform any work as result of the closure. These costs must be accounted for in accordance with any corporate policies they may have, e.g. temporary reassignment to other projects, administrative or other leave, etc.

Summary of Deliverables

<u>Task</u>	<u>Deliverable</u>	<u>Due Date</u>
Task 1	One-on-one Counseling Sessions	Daily, As Required
	Minimum of Six Group Counseling Sessions	Yearly
	Reports showing One-on-one Counseling Sessions and Meetings with EPA Personnel	30 Days After the end of the calendar quarter.
Task 2	One-on-one Technical Assistance Sessions	As Required
	Minimum of Four Group Training Sessions	Yearly
	Annual Training Schedule	As Required
	Draft Training Manual	As Required
	Revisions to Training Manual	30 Days Prior to Use
	Provide Participants a Copy of Training Manual	At each session
Task 3	Reports Showing the number of OSDBU Outreach Sessions Supported, business fairs attended, and meetings with Small Business Associations, Chambers of Commerce, EPA personnel, contractors, and grant recipients.	30 Days after the end of each calendar quarter.
Task 4	Draft Operating Procedures	As Required
	Intake and Tracking Process Reports	30 Days after the end of each calendar quarter
	Meeting with PO/OSDBU Director To Discuss Issues	Quarterly or as otherwise needed

Task 5	Draft format for recurring reports	5 Working Days After award of Contract or option
	Recurring Monthly Reports (Attendance Reports) (Counseling Reports) (Planned Group Sessions) (Actual Group Sessions)	5 Working Days After the end of Each Month
Task 6	Draft Customer Feedback Form	As Required
General	Articles for OSDBU Newsletter	Quarterly